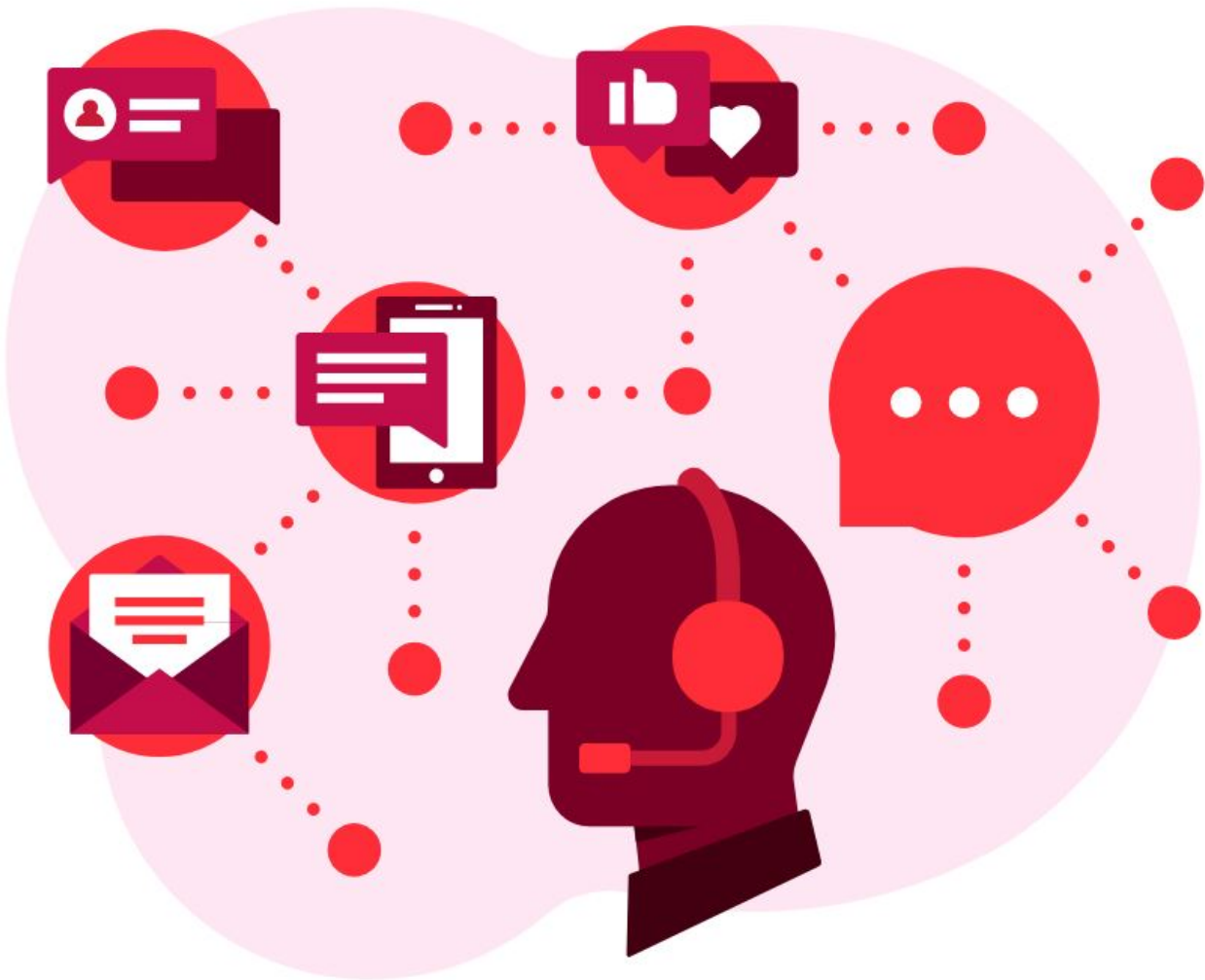


# SSRS Reports Manual



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# About

The T-Metrics reports website is powered by an application called Microsoft SQL Server Reporting Services (SSRS). SSRS is entirely web based.

Supported Browsers:

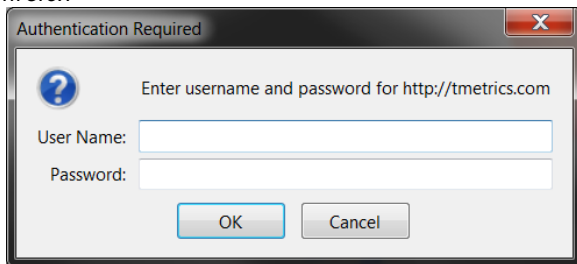
- Internet Explorer
- Edge (requires SQL 2016)
- Mozilla Firefox (requires SQL 2016)
- Chrome (requires SQL 2016)

## Logging into the SSRS Reports

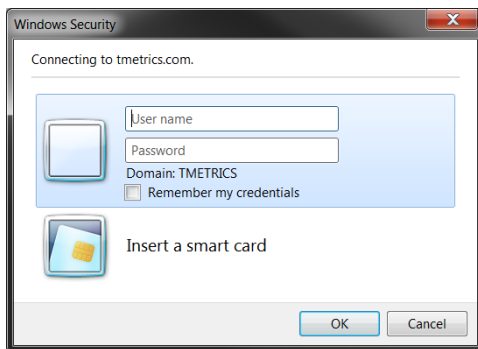
To access the reports website use your web browser to go to <your company's SQL database name or IP>/reports (for example, an address could be 127.0.0.1/reports or tmetricsreports/reports)

If your credentials are not automatically passed to the website, you will see a user login box similar to the ones shown here:

*firefox*



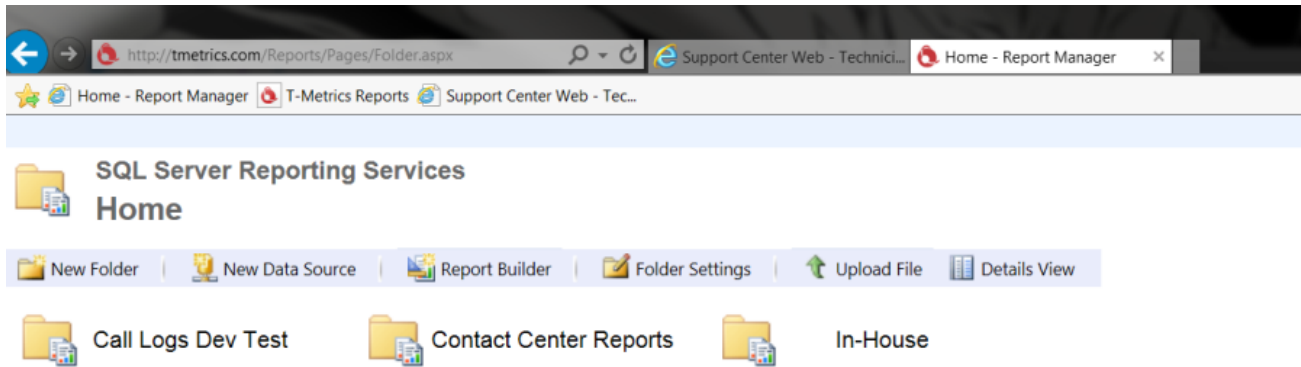
*internet explorer*



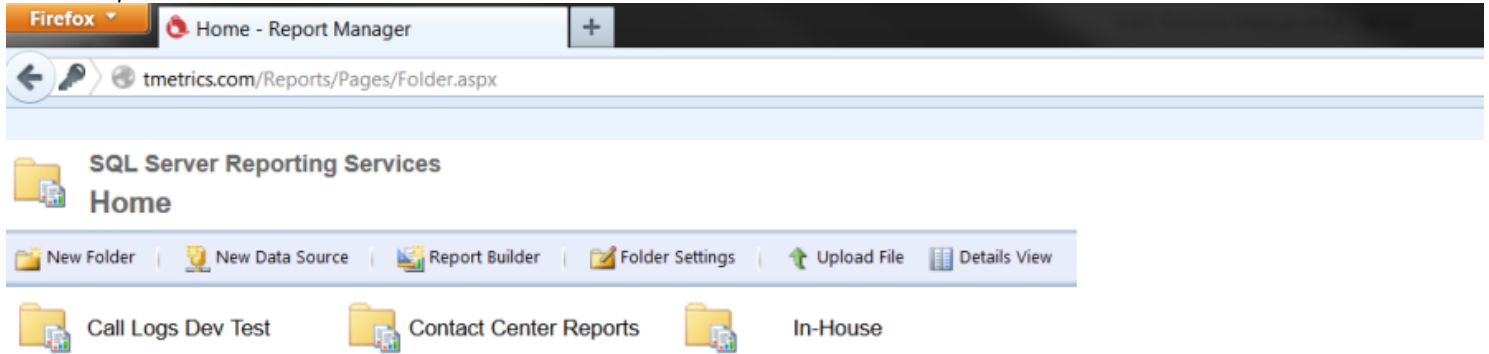
Depending on your company's security policy, your username and password should be the same as what you use to log into your Windows computer. Each system is different and it is just as likely that you won't be prompted to enter both a *User Name* and *Password*.

Once you have logged in you should see your Home screen. It will only display the reports or folders that you have been given access to and will look similar to the pictures below:

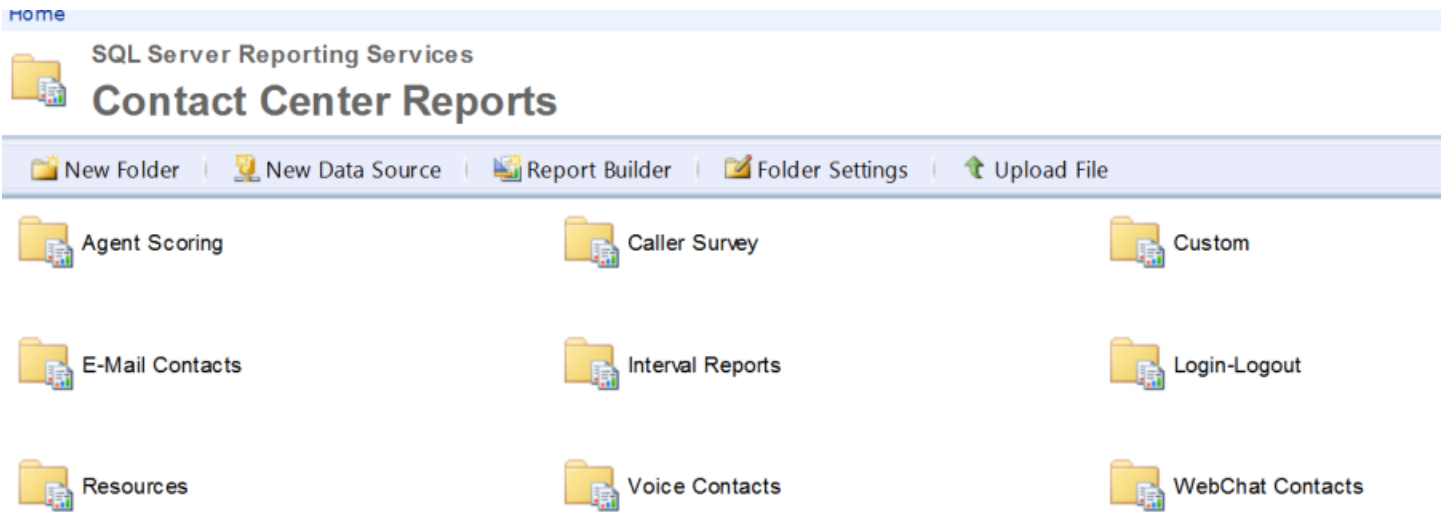
firefox



internet explorer



All ACD reports are found under the Contact Center Reports folder.



## A Few Examples

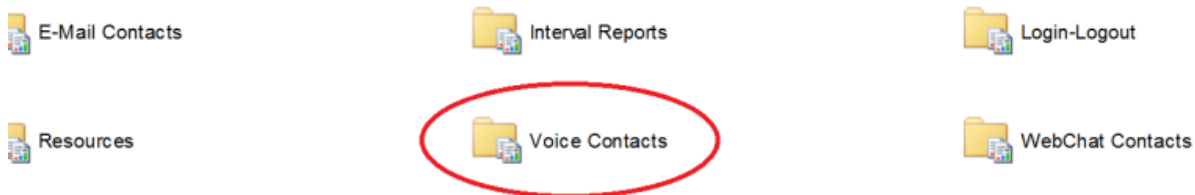
- The Voice Contacts folder contains all the reports that pertain to calls going through the system.
- Login-Logout folder has information pertaining to your agents logging in and out of the system or who is assigned to what skills.
- The Custom Reports folder is where any custom reports that have been created by the system admin for your use are located.

## Running a Report

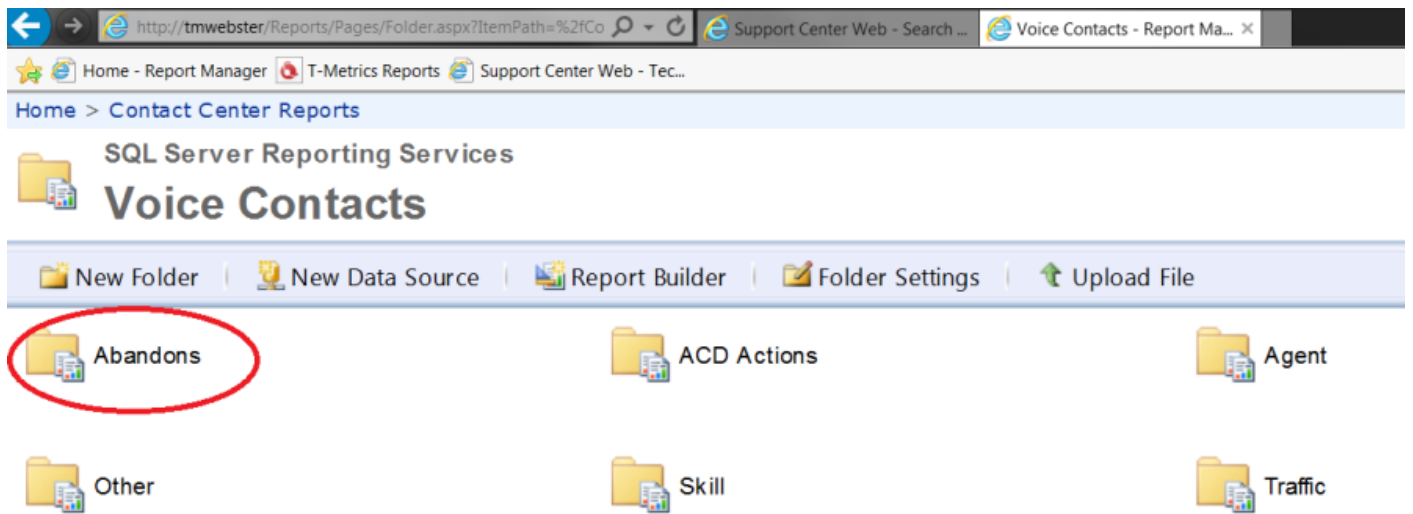
Here is an example of a report being run. We will run the *Abandon Calls Detailed Report*.

## Step by Step Navigation

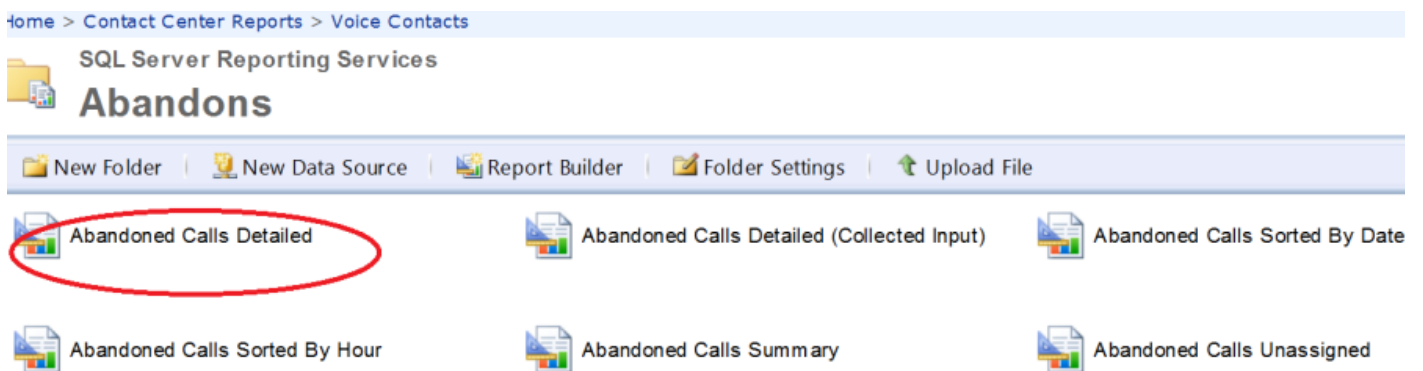
1. Click on *Voice Contacts*:



2. Once inside, click on *Abandons*.



3. Several reports are now visible. Click on the one marked *Abandoned Calls Detailed*.



4. You will then be prompted to select a date range:

The screenshot shows the filter form for the 'Abandoned Calls Detailed' report. The breadcrumb trail is 'Home > Contact Center Reports > Voice Contacts > Abandons > Abandoned Calls Detailed'. The form includes fields for 'Start Date' (11/20/2013), 'End Date' (11/20/2013), 'Skills' (a dropdown menu), and 'Agents' (a dropdown menu). A 'View Report' button is located on the right side of the form.

5. Select the skill(s) that you wish to see in your results.

home > Contact Center Reports > Voice Contacts > Abandons > Abandoned Calls Detailed

Start Date: 11/1/2013 End Date: 11/20/2013 View Report

Skills: EmergSupport Agents: Abandoned, AH SENTINEL, BOO

1 of 1 100% Find | Next

### Abandoned Calls Detailed

Start Time	Agent	Duration	Queue Time	Agent Ring	Agent Phone	Caller ID	Sk
11/03/2013 18:03:28		92	62				EMERGI
11/16/2013 23:19:50		65	37				EMERGI
11/16/2013 23:21:29		42	25				EMERGI
11/16/2013 23:22:31		31	22				EMERGI
11/16/2013 23:23:26		50	38				EMERGI
11/16/2013 23:25:06		64	29				EMERGI

View Help

6. Under *Agents* you are able to select all agents or only specific agents. For this example all agents have been selected.

Home > Contact Center Reports > Voice Contacts > Abandons > Abandoned Calls Detailed

Start Date: 11/1/2013 End Date: 11/20/2013

Skills: (Select All) AFSupport EMAIL ☒ EmergSupport PremSupport SUPPORT

Agents:

7. Press *View Report* and the report will display below the toolbar. Once your report is displayed you should also see a toolbar just below the report criteria portion of the screen:

1 of 1 100% Find | Next

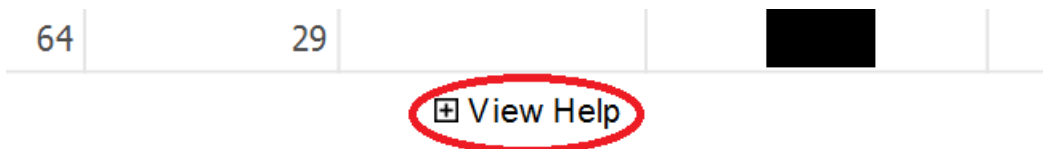
Export

The toolbar will help you navigate the report page by page but it will also allow you to export the report so that you can view it in another program. To do this click on the export button and select the file format you would like to export the report to.

## T-Metrics Help Feature

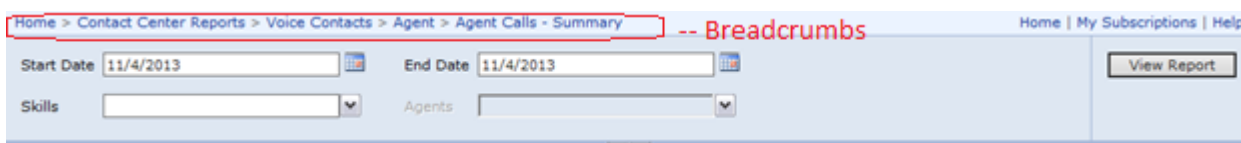
SSRS has a *View Help* feature at the bottom of the **last page** each report. It is a built-in feature to give detailed explanations of all the fields in each report.

**NOTE:** For any descriptions of reports types, check the *HELP – Report Descriptions* file:



## Breadcrumbs

If you have drilled down several levels you can easily go back up the folder structure to a previous folder by clicking on its name at the top of the screen.



## Setting Subscriptions

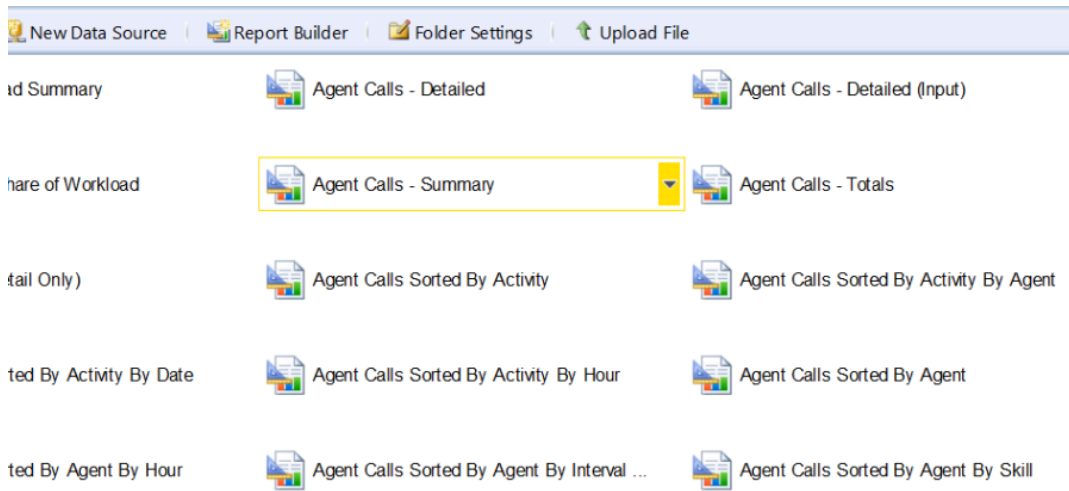
## Requirements

- SSRS
- SSRS Account

## Procedure

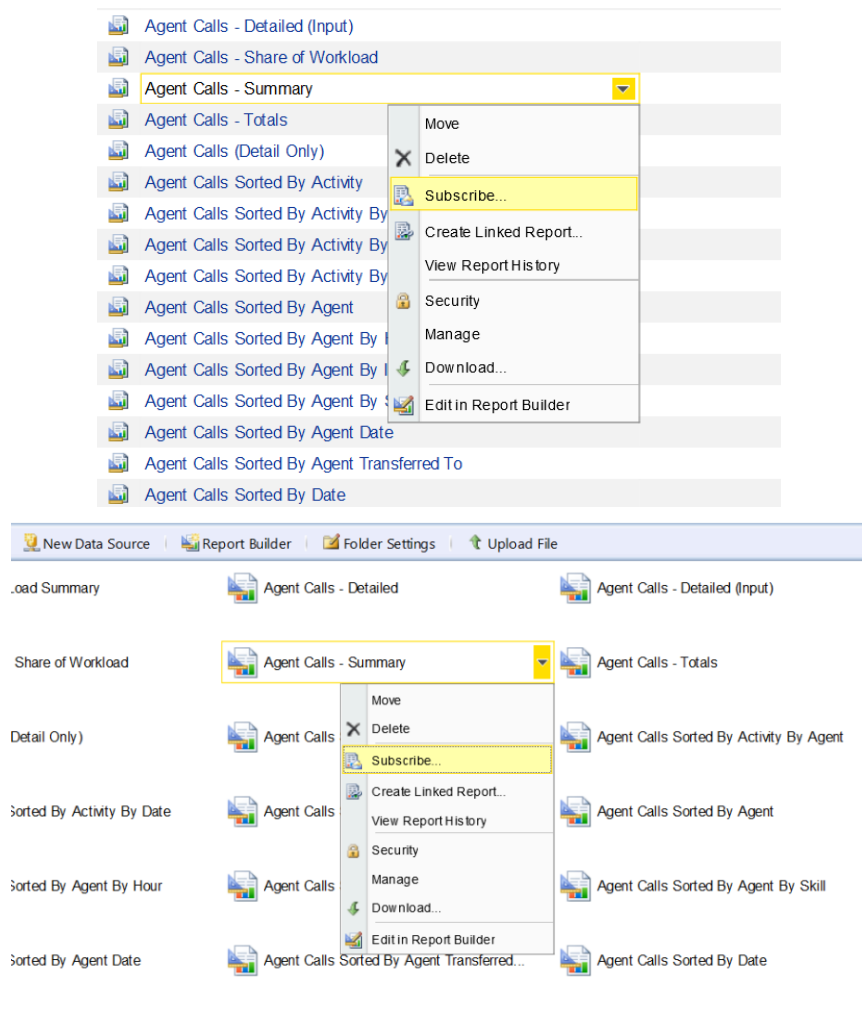
Pick the report

- The first step is to decide the report you wish to subscribe to.
- In this example we will use Agent Calls – Summary, This would show a one line report of the totals and average calls and talk times for all the agents you select.



## Enter the Subscribe Menu

- Click the black arrow in the yellow box at the right of the report that shows up when it is highlighted.
- Depending on your version and what view mode you are in, this screen may look slightly different. Below are two examples of the two views



## Select Your Export Options

- You can choose either to deliver the reports by email, or by Windows file share. Both of these options are explained below.

### Delivered by Email

Email capability requires that an SMTP server is configured by an administrator on the SSRS server. If E-mail is not listed, contact your administrator.

- Change the *Delivered by* dropdown to email if it is not already.
- The form is almost exactly the same as a normal email form. The main difference is that the subject will have *@ReportName* and *@ExecutionTime*, which will be replaced with the information from the report once it is run.
- Also important is *Render Format*. This will change how the report is saved to a file. In the **List of File Formats** section, there is a list of the options.

The screenshot shows the 'Report Delivery Options' form. At the top, it says 'Specify options for report delivery.' Below this, the 'Delivered by:' dropdown is set to 'E-Mail'. There are input fields for 'To:', 'Cc:', and 'Bcc:', with a note '(Use ; to separate multiple e-mail addresses.)'. The 'Reply-To:' field is empty. The 'Subject:' field contains '@ReportName was executed at @ExecutionTime'. There are two checkboxes: 'Include Report' (checked) and 'Include Link' (checked). The 'Render Format:' dropdown is set to 'MHTML (web archive)'. The 'Priority:' dropdown is set to 'Normal'. There is a 'Comment:' text area at the bottom.

### Delivered by Windows File Share

- Change the *Delivered by* dropdown to Windows File Share if it is not already.
- File Name is simply the name that the file will be saved as.
- Path is the full path to where you want the file to be saved to. This will normally be a full path to a shared directory, but can be anywhere which the computer that runs the report can access.
- Render Format* will change how the file is output and what extension it is saved as.
- Credentials will most likely be needed. The only time you do not have to worry about credentials is if the full path has total access to all users throughout. The credentials just need to be that of a user, or account made specifically for this, that can access and modify in the path desired.

The screenshot shows the 'Report Delivery Options' form for Windows File Share. At the top, it says 'Specify options for report delivery.' Below this, the 'Delivered by:' dropdown is set to 'Windows File Share'. There is a 'File Name:' input field with the text 'Agent Calls - Summary'. Below it is a checkbox 'Add a file extension when the file is created' which is checked. There is a 'Path:' input field. The 'Render Format:' dropdown is set to 'CSV-Plain'. There are two input fields for 'Credentials used to access the file share': 'User Name:' and 'Password:'. At the bottom, there are three radio buttons for 'Overwrite options:': 'Overwrite an existing file with a newer version' (selected), 'Do not overwrite the file if a previous version exists', and 'Increment file names as newer versions are added'.

## List of File Formats

Extension Name	Description
<b>XML</b>	Renders a report in XML. The report opens in a browser. Additional transformations applied to this XML output may be a cost effective way of avoiding developing your own rendering extension.
<b>CSV</b>	Renders a report in comma-delimited format. The report opens in a viewing tool associated with CSV file formats.
<b>IMAGE</b>	Renders a report in a page-oriented format. The format is shown as <b>TIFF</b> in the Export drop-down of the report toolbar.
<b>PDF</b>	Renders a report in the Adobe Acrobat Reader. The format is shown as <b>Acrobat (PDF) File</b> in the Export drop-down of the report toolbar.
<b>EXCEL</b>	Renders a report in Microsoft Excel.
<b>WORD</b>	Render a report in Microsoft Word.
<b>HTML 4.0</b> (part of the HTML rendering extension)	HTML is the format used to initially render the report. If your browser support HTML 4.0, that is the format that is used. Otherwise, HTML 3.2 is used.
<b>MHTML</b> (part of the HTML rendering extension)	Renders a report in MHTML. The report opens in Internet Explorer. The format is shown as <b>Web Archive</b> in the Export drop-down of the report toolbar.

## Subscription Options

- The first spot is to check whether you want the report to actually run. This only determines the time the report is run and not the window it gets data from. You can either use a preset shared schedule or select a custom schedule. The latter will open a new page with scheduling options.
- *Report Window* determines how much data to pull with each run.
- Start Date and End Date should stay on *Use Default*. Changing those fields may result in unexpected output.
- The Skills and Agents options work exactly as in the report itself.

### Subscription Processing Options

Specify options for subscription processing.

Run the subscription:

- ☒ When the scheduled report run is complete. Select Schedule  
 At 8:00 AM every Mon of every week, starting 4/1/2015  
☐ On a shared schedule: Test ▼  
 At 11:30 AM every Mon, Tue, Wed, Thu, Fri of every week, starting 9/9/2011

### Report Parameter Values

Specify the report parameter values to use with this subscription.

#### ReportWindow

Daily ▼ ☐ Use Default

#### Start Date

4/1/2015 12:00:00 AM ☒ Use Default

#### End Date

4/1/2015 12:00:00 AM ☒ Use Default

#### Skills

▼

#### Agents

▼ ☒ Use Default

OK Cancel

Press "OK" and wait for your subscriptions to start coming in.

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